



FM CREATIVE INC.

PRINT • DESIGN • SIGNAGE • DISPLAY

USER MANUAL

Job Card & Workflow System

From approved quote to final invoice: a complete guide for every role.

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Software designed and developed by **Pixela Pty Ltd.**

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01

About this system

The FM Creatives Job Card & Workflow system keeps every job in one place, from the approved quote to the final invoice. Everyone in the team sees the same live information, so nobody has to chase a job by phone or paper.

One place

Jobs, artwork, materials, stock, quotes and invoices are all stored together.

Clear hand-overs

Design, Print, Book production, Installation and Accounts each see only the work that is theirs.

Always current

Open it on a computer or phone. Everything is saved on the server automatically.

Who uses which role

Role	What they do
Director	Sees everything. Creates logins, creates jobs, cancels or reactivates jobs, and views reports.
Production Manager	Receives new jobs, assigns departments and deadlines, oversees progress, then checks and verifies the finished job.
Design	Prepares and corrects artwork, and updates design progress.
Print Lead	Runs the printing work and updates print progress. Printing must be complete before Book production starts.
Book Production Supervisor	Binding, stitching and trimming (guillotine) after printing. Can see material and stock details.
Installer	Fits or delivers the job and updates installation progress.
Accounts	Receives verified jobs, sends the invoice, and records payment. Also follows up quotations.

Tip

You only see the tabs your role is allowed to use. If a tab is missing, it is not part of your role.

02

Getting started: logging in and finding your way

For: everyone

- 1 Sign in with the user ID and password you were given. Your role shows next to "Signed in as" at the top.
- 2 The tabs under the header are the main sections: Dashboard, Job Cards, New Job, Stock, Quote, Users and Help. You only see the tabs your role is allowed to use.
- 3 Your Dashboard shows the jobs and alerts that need your attention first.
- 4 Always press Logout when you finish on a shared computer.

The Dashboard: the coloured tiles count jobs by status. Click a tile to see those jobs.

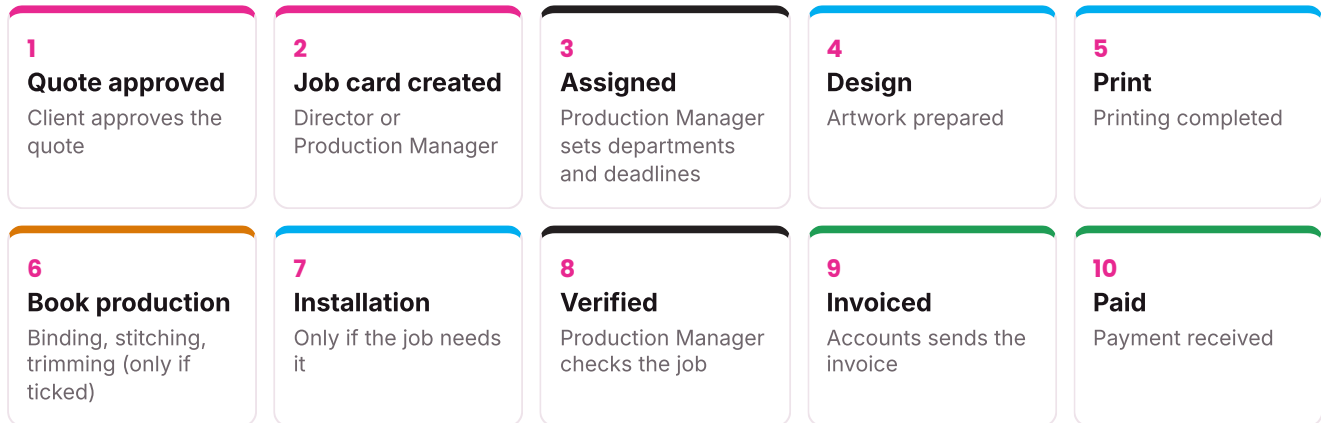
The main tabs

Tab	Use it to
Dashboard	See alerts, your actions, and jobs by status.
Job Cards	Search, open and update jobs.
New Job	Create a job card after a quote is approved.
Stock	Receive stock, check balances, monthly report.
Quote	Follow up quotations (Director and Accounts).
Users	Create logins and reset passwords (Director).
Help	Short guides and this manual.

03

How a job moves through the system

For: everyone



- 1 A quote is approved by the client and a job card is created.
- 2 The Production Manager assigns the work: Design, Print, Book production (binding, stitching, trimming), Installation, supplier work and the materials needed.
- 3 Each department updates its status, progress notes, artwork corrections and deadlines on the job card. Book production starts after printing is complete.
- 4 When production is finished, the Production Manager checks and verifies the job.
- 5 Accounts then sends the invoice and marks payment as received.

FM CREATIVE INC. **Job Card & Workflow** Signed in as **Director** Director Logout

Job Cards Search by job number, client, quot All FROM DATE TO DATE mm/dd/yyyy mm/dd/yyyy Apply Clear

2 job cards Job dates: all dates Showing 1-1 | Page 1 of 2 Prev 1 2 Next

Job-00001 **Kgale Primary School**

In production PDF View Print

DATE	FINAL DEADLINE	CONTACT	TELEPHONE	CLIENT EMAIL	QUOTE NUMBER
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A job card shows progress for each department: Design, Print, Book production, Installation and Accounts.

Book production comes after printing

If a job has Binding & stitching or Trimming (guillotine) ticked, the Book Production Supervisor sees it only once printing is complete.

04

Creating a new job card

For: Director, Authorised Job Creator, Production Manager

- 1 Open the New Job tab.
- 2 Fill in the client and job details, the size, and the deadlines.
- 3 Under Job requirements, tick every kind of work this job needs (see "Job requirements explained").
- 4 Choose the materials to be used (see "Choosing materials and paper").
- 5 If part of the job goes to a supplier, open the Outsource / Supplier Work section and add it.
- 6 Upload the artwork files if you have them. Small images and PDFs can be previewed.
- 7 Press Create job card. The job now appears in the Job Cards tab and on the Dashboard.

The New Job form. Start with the client details, then scroll down for requirements and materials.

Tip

Create a job card only after the client approves the quote. The job number (Job-00001, Job-00002...) is generated automatically; the quote number is typed in.

05 Job requirements explained

For: Director, Authorised Job Creator, Production Manager, Print Lead, Book Production Supervisor

- 1 Design required: the design team prepares or corrects the artwork.
- 2 Print required: the print department produces the job.
- 3 Installation required: the installation team fits or delivers the job.
- 4 Binding & stitching and Trimming (guillotine): book finishing. Ticking either one sends the job to the Book Production Supervisor after printing is complete. Book production has its own status, progress and deadline.
- 5 A job needs at least one kind of work ticked, or at least one outsourced component.

Job requirements [Need help?](#)

☒ Design required	☒ Print required	☒ Installation required
☒ Binding & stitching	☒ Trimming (guillotine)	Binding or trimming sends the job to Book production after printing is complete.

Tick every kind of work the job needs. Binding or trimming sends the job to Book production after printing.

06

Choosing materials and paper

For: Director, Authorised Job Creator, Production Manager

- 1 In the Materials section of the job, tick the material you will use, then pick its options.
- 2 Paper materials are Bond, NCR (60gsm), Glossy and Matte. NCR comes as CB White, CFB Blue, CFB Yellow, CFB Pink and CFB Green.
- 3 Covers are Manilla in White, Tokai Blue or Pink. The backing board is Dehalm Board (120gsm).
- 4 Type the GSM or size where the form asks for it.
- 5 If the stock is enough, the material is issued from stock. If it is short, a purchase request is raised and shows as "Materials pending" on the job.
- 6 If a material you need is not in the list, a Director can add it as a custom stock material in the Stock tab.

Materials to be used [Need help?](#)

PRODUCTION MATERIALS
Vinyl, acrylic, boards, sheets, lighting, and regular signage materials.

☐ **Budget Vinyl**
Exact color, size, finish, and quantity are entered below in Material Issues.

☐ **3 Year Vinyl**
Exact color, size, finish, and quantity are entered below in Material Issues.
Brand name
Enter brand name

☐ **Color Vinyl**
Exact color, size, finish, and quantity are entered below in Material Issues.

☐ **Sandblast**
Exact color, size, finish, and quantity are entered below in Material Issues.
Brand name
Enter brand name

☐ **Poster Paper**
Exact color, size, finish, and quantity are entered below in Material Issues.
Brand name
Enter brand name if any

☐ **Bond Paper**

☐ **NCR Paper (60gsm)**

☐ **Glossy Paper**

☐ **Matte Paper**

Tick each material the job uses. Paper, NCR, covers and boards are in this list.

Paper and board range

Material	Options
Bond Paper	Plain bond paper
NCR Paper (60gsm)	CB White; CFB Blue, Yellow, Pink, Green
Glossy Paper / Matte Paper	Choose size and quantity
Manilla Cover	White, Tokai Blue, Pink
Dehalm Board	120gsm backing board

07

Assigning departments and deadlines

For: Director, Production Manager

- 1 Open the job in Job Cards.
- 2 In the production section, set the deadline for each department that is required.
- 3 Save the assignments. Departments that are required move to In progress and see the job on their Dashboard.

08

Supplier (outsourced) work

For: Director, Authorised Job Creator, Production Manager

- 1 On the New Job form, open Outsource / Supplier Work.
- 2 Add a component for each piece that goes outside, such as laser cutting, T-shirts, embroidery, DTF, sublimation or digital printing.
- 3 Choose whether the supplier does one process on your material, supplies the item for you to brand or finish, or does the whole job.
- 4 Say whether the material comes from your stock or from the supplier.

09

Updating your department's progress

For: Design, Print Lead, Book Production Supervisor, Installer

- 1 Open the job from your Dashboard or the Job Cards tab. Book Production Supervisors see a job on their Dashboard once printing is complete.
- 2 Set your department's status: Pending, In progress, On hold, Blocked / issue, or Complete.
- 3 Add a short note about what was done and what is still outstanding, for example "Printed 12 panels, lamination pending".
- 4 Use Blocked / issue when you cannot continue (missing artwork, missing material). The Production Manager will see it.
- 5 Mark Complete only when your part is fully finished.

Status meanings

Status	Meaning
Pending	Not started yet.
In progress	Work has started.
On hold	Paused on purpose.
Blocked / issue	You cannot continue. The Production Manager is alerted.
Complete	Your part is fully finished.

10

Stock: receiving, checking and reporting

For: everyone

- 1 The Stock tab shows Current Stock, the Stock Ledger (every movement in and out) and a Monthly Stock Report.
- 2 To book in new stock, use Receive stock: pick the material, fill in its options and the quantity.
- 3 Use the search box to find an item quickly.
- 4 Every material issued to a job is taken from stock, so keep received quantities accurate.

The screenshot shows the 'Job Card & Workflow' interface. At the top, the header includes the 'FM CREATIVE INC.' logo, the text 'PRINT • DESIGN • SIGNAGE • DISPLAY', the version 'Ver:1, Copyright: Pixela Pty Ltd.', and a user profile 'Signed in as Director' with a 'Logout' button. Below the header is a navigation bar with tabs: 'Dashboard', 'Job Cards', 'New Job', 'Stock' (which is highlighted), and 'Quote'. On the right side of the navigation bar are 'Users' and 'Help' buttons. The main content area is titled 'Stock' and includes a subtitle: 'Maintain material purchases, available balance, low stock level, and job-card issue history.' To the right of this subtitle is a search bar with the placeholder text 'Search material, supplier, statu' and a 'Clear' button. Below the subtitle are three summary cards: 'STOCK ITEMS' showing '0 Active material records', 'LOW STOCK' showing '0 At or below alert level', and 'OUT OF STOCK' showing '0 Zero balance'. At the bottom of the main content area is a section titled 'Current Stock' with the text 'Balances reduce when stock is issued from a job card.' and a large dashed box containing the message 'No stock entered yet. Add first material purchase from Receive stock.'

The Stock tab: current balances, low-stock alerts and the form to receive new stock.

11

Invoicing and payment follow-up

For: Director, Accounts

- 1 Wait until the Production Manager has verified the job. The job is then sent to Accounts.
- 2 Open the job. In the Accounts invoicing box, check the completed date, enter the invoice number, invoice date and amount, and upload the invoice PDF if you have it.
- 3 Press Mark invoiced.
- 4 Use the email button on the job to send the invoice. The email text is copied for you. Attach the invoice PDF yourself, then send.
- 5 When the client pays, set Payment received to Yes for that job in the completed jobs register on the Dashboard.
- 6 For unpaid invoices, use the reminder button. The system flags an invoice for a reminder about every 7 days.

12 Quote follow-up

For: Director, Accounts

- 1 Open the Quote tab.
- 2 Upload each quote PDF to the register. The system tries to read the quote number, date and total; check them and correct if needed.
- 3 The tab tells you which quotes need a client follow-up.
- 4 When a client accepts, create the job card and enter the same quote number on the New Job form. The quote is then marked as converted automatically.
- 5 If the price changes after negotiation, revise the quote and upload the new PDF. The latest revision becomes the active amount.

The screenshot displays the 'Job Card & Workflow' interface for FM Creative Inc. The top navigation bar includes the company logo, name, and tagline 'PRINT • DESIGN • SIGNAGE • DISPLAY', along with the version 'Ver:1, Copyright: Pixela Pty Ltd.'. The user is signed in as 'Director' and can click 'Logout'. The main navigation menu features 'Dashboard', 'Job Cards', 'New Job', 'Stock', 'Quote' (highlighted), 'Users', and 'Help'.

The 'Quote Follow-up' section is active, showing a summary for 'OCTOBER 2026'. Below the month header, four summary boxes are displayed:

CONVERTED TOTAL	LOST QUOTE TOTAL	CONVERTED INVOICE	OPEN QUOTE TOTAL
P 0.00	P 0.00	P 0.00	P 0.00

At the bottom, there are four tabs: 'OPEN QUOTES', 'FOLLOW-UP DUE', 'CONVERTED', and 'OPEN VALUE'.

The Quote tab lists quotations and which ones have become job cards.

13 Users and passwords

For: Director

- 1 Open the Users tab. Only a Director can create or reset logins.
- 2 Use Create login to add a person: give a name, a role and a starting password.
- 3 Ask each person to change their starting password.
- 4 Use a strong password for the Director login and never share it.

FM CREATIVE INC. PRINT • DESIGN • SIGNAGE • DISPLAY **Job Card & Workflow** Ver:1, Copyright: Pixela Pty Ltd.

Signed in as **Director** Director **Logout**

Dashboard **Job Cards** **New Job** **Stock** **Quote** **Users** **Help**

Users

Directors are named users. Departments can use department logins with passwords created here.

Current users

Director User ID: director - No email **Director**

Reset password

New temporary password **Reset**

Thabo Mokoena User ID: pm - No email **Production Manager**

Create login

Training login helper

Reset all department passwords to the shared default. Director passwords are not changed. The new password is shown here once, after you confirm.

Reset department passwords

Name

The Users tab: the Director creates logins and resets passwords here.

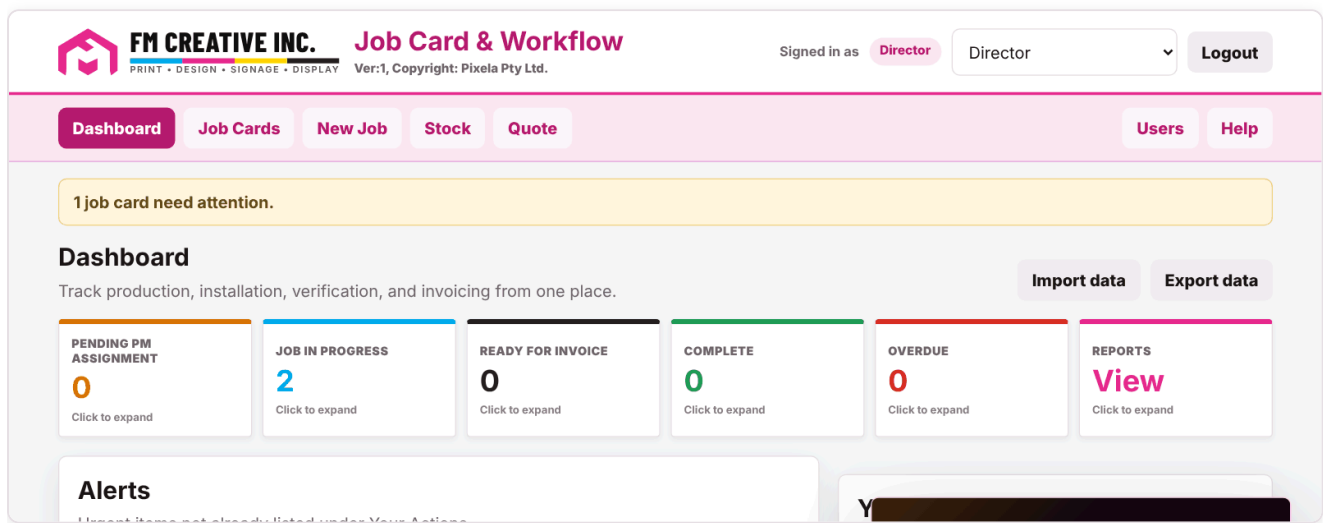
Keep passwords private

Never share a login. If someone leaves the company, tell the Director so their access can be removed.

14 Staff chat

For: everyone

- 1 Press the Chat button at the bottom of the screen.
- 2 Open an existing group, or create a new group and choose its members.
- 3 You can link a job card to a message so everyone knows which job you mean.
- 4 Only members of a group can see its messages. A Director can clear the chat.



Open Staff Chat with the button at the bottom right. Chat by role channel or start a group.

15

Something looks wrong

For: everyone

- 1 Page looks old after an update: hold Shift and press the reload button (or Ctrl+Shift+R on Windows, Cmd+Shift+R on Mac).
- 2 Logged out suddenly: sign in again. Your work is saved on the server.
- 3 A tab is missing: your role does not use it. Ask a Director if you need access.
- 4 Email button did nothing: the email text was copied. Paste it into a new email.
- 5 On a phone you can add the app to your home screen from the browser menu.
- 6 Still stuck: tell your Director what you pressed and what you saw.

Need more help?

Contact Pixela support: hp@pixela.co.bw or 74080099.